SP Checklist

Use the SP Checklist to ensure the accuracy of forms submitted.

Barcode:

- ☐ (A) Make sure the barcode is generated as a high resolution bitmap.
- ☐ (B) Make sure the barcode accurately reads as correct barcode *number* for your company.
- ☐ (C) Make sure the barcode *number* is properly placed based on specifications given.
- ☐ (D) Make sure the barcode is properly placed based on specifications given.
- ☐ (E) Make sure the barcode is the correct size based on specifications given.
- ☐ (F) Make sure the scanned and printed barcode #s match.
- ☐ (G) Make sure the barcode reads.
- ☐ (H) Make sure the barcode is not missing.

Line Geometry:

- ☐ (I) Ensure the line geometry matches the required SD or Approved Trained Version (ATV).
- ☐ (J) Make sure lines are solid, not too thin or too bold. Lines should be consistent throughout.

Scan Band/Lines:

- ☐ (K) Make sure the variable scanband data is in 12 point "Courier" or "New Courier".
- ☐ (L) Make sure the variable scanline data is in 12 point "Courier" or "New Courier".
- ☐ (M) Make sure all required fields are populated; the fields should not be blank.
- ☐ (N) Make sure the correct data flows from the supporting field into the scan band/line.
- ☐ (O) Use the correct *period* end date and check digit from the period ending chart provided.
- ☐ (P) Calculate the correct check digit for account identification or SSN/FEIN in the scanline.
- ☐ (Q) Use the correct *function code* from the SD Spec provided on the SES.
- ☐ (R) Update all fields with an amount or "0" or a "Y/N" for yes/no indicators in the scanband.
- ☐ (S) Show the correct number of characters in scanband.

Data and Placement:

- ☐ (T) Confirm all fields are included, populated and correctly formatted.
- ☐ (U) Validate the data placement matches either the SD or ATV.
- ☐ (V) Confirm money is formatted to two decimals as "0.00" with no commas, right justified.
- ☐ (W) Make sure all data fields match length and variable letters shown on SD/ATV Version.
- ☐ (X) Make sure all data fields are formatted for the proper alpha/numeric field(s).
- ☐ (Y) Verify all variable text is correct and in CAPITAL letters.
- ☐ (Z) Make sure there are no continuous 9s or Xs.

Form's Alignment:

☐ (AA) Overlay and confirm the data placement of the form set matches either the SD or ATV.

Test Samples:

☐ (BB) Review the SD Form Spec for the correct number and variety of test samples to submit.

☐ (CC) Verify test samples data match and align with the full field data.

☐ (DD) Confirm form and/or instructions have the correct revision date.

☐ (EE) Make sure the correct year is listed or hardcoded on applicable forms, including titles.

☐ (FF) Document any limitations on the e-mail/header sheet.

☐ (GG) Format addresses without any punctuation as required.

☐ (HH) Use the correct postal abbreviations for states unless formatting a foreign address.

☐ (II) Use the correct prefixes of 999, 900, 666 or 000 for FEINs/SSNs.

☐ (JJ) Include foreign zip code 00000 on test samples for forms D-400V, D-400V Amended, D-410, D-410P, NC-40 or NC-EDU.

☐ (KK) Verify the form does not have NCDOR logo when submitting.

☐ (LL) Verify the form has no invalid symbols when submitting.

Forms are expected to be submitted and approved within (30) business days of the posted date.

The final version of the form must be submitted at least (5) business days prior to the approval dates noted in instructions.

All forms should be approved in three (3) or fewer attempts.

E-mail PDF submissions to SDFormsUpdate@ncdor.gov

Use the naming scheme and instructions for PDF submissions on NCDOR public website at:
All Files | FTA State Exchange System

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